



How-to use a range of free reporting tools that can help you manage your fleet and costs.

The screenshot shows the BP Fuelcard Online dashboard. At the top left is the BP logo and the text 'BP Fuelcard Online'. To the right, there is a user greeting 'Hello, Fleet Manager' with a dropdown arrow, and links for 'Logout' and 'Help'. Below this is a search bar containing 'XXXXXXXXON LIMITED (0110075580)'. To the right of the search bar, it displays 'Current Balance \$ 570.00' and 'Account Status: Active' with a link to 'Account Details'. A navigation bar below the search bar has five tabs: 'Home', 'Cards', 'Transactions', 'Reports', and 'Support'. The main content area features a 'Welcome, Fleet Manager' message and a brief description of the service. On the right side of the main content area, there is an 'Account Summary' box with the following details:

Account Summary	
XXXXXXXXON LIMITED (0110075580)	
Account Status	Active
Current Balance	\$ 570.00
Last Bill Amount	\$ 270.00

Some popular reports are:

+ Export Transactions

Monitor transactions against different indicators, across all accounts or a specific account

+ Unusual Activity

Also known as Exceptions, keep a close eye on expenses and quickly identify any unusual transactions

+ Cost Centre Lists

Efficiently track costs and allocate expenses to particular areas of your business

+ Export Card Lists

Quickly perform audits of all cards across your accounts

+ Fleet Control Report (FCR)

Transaction report that can focus on a single Cost Centre, Reference Number, Card Number or Vehicle Registration. Can be run across a date range of your selection.

+ Odometer Report

Quickly perform audits of all cards across your accounts



▶ Running a report

1. Access the **Run a Report** screen

- Select **Run a Report** from the main menu under Reports or
- Click directly on **Run a Report** in the Run Reports section on the homepage

2. Select a report

- Select the appropriate report type for your needs
- Select the specific report you want to run from the report details section

Did you know?

If you are unfamiliar with the reports available, an **About This Report** panel helps you select the right one by explaining what each contains as you highlight it.

You can refer to the BP Fuelcard Online User Help Guide on bpfuelcard.co.nz for further information.

3. Filter the report

- Apply a date range or pre-determined period using the Report Filters
- Further refine by, for example, card number or cost centre, using the Advanced Report Filters

4. Schedule the report

- Select 'Run this report just once'
- Choose how you want the report delivered
 - + Download and Display it; or
 - + Have it emailed to either a person in the account's Contacts list or - if the person is not in the list – to an email address provided
- Compress the report into a zip file (only necessary if you expect the report to be large)
- Click **Run Report**

Run a Report

Choose suitable settings for your report and select Run Report. Required information is marked with a *.

Report Type

* Report Type

- Cards
- Cards Activity - Bulk
- Cost Centres
- Fleet**
- Fuel Consumption
- Odometer
- Transactions
- Unusual Activity (Exceptions)
- Vehicle and Driver

* Report Detail

Fleet Analysis Report

Report Filters

Use filters to limit the report to a specific date range or account etc.

* Account [Select multiple accounts](#)

XXXXXXXXON LIMITED (0110075580)

* Date from * Date to Or apply a date range:

▶ Advanced Report Filters

Report Scheduling

* Report scheduling

Run this report just once

Schedule this as a new Recurring Report

Report Delivery

* Report delivery

Download and display

Send to contact email:

Send to this email:

Compress email attachment

Did you know?

You can also choose the report to run across more than one account, by using the **Select Multiple Accounts** function.



➤ Scheduling a recurring report

Schedule a Recurring Report

Choose suitable settings for your report and select Run Report. Required information is marked with a *.

Report Type

* Report type

- Bulk Card Activity
- Cards
- Cost Centres
- Emissions
- Fleet**
- Fleet Control
- Fuel Consumption
- Invoice
- Odometer

* Report detail

Fleet Analysis Report

About This Report

The Fleet Analysis report displays your fleets usage statistics, including 'fuel consumption' and ODO readings in PDF format.

This report can be utilised to ensure that all cards within a fleet are being used correctly, and all Odometer readings at the point of sale are being input correctly by drivers.

For more details about the different formats [visit the User Help Guide](#).

Report Filters

Use filters to limit the report to a specific date range or account etc.

* Account Select multiple accounts

R B Langtree (0111002233)

* Date from to Or apply a date range:

▶ Advanced Report Filters

To schedule a report to run at regular intervals, go through the first 3 steps for 'Running a report' and choose 'Schedule this as a new Recurring Report', in the Report scheduling section, then:

a. Give the report a name

Something you will recognise when it is later emailed to you or when you are locating it in a list of recurring reports.

b. Determine how often you want the report to run

For example weekly, fortnightly or monthly - noting that the run cycle selected will override any date ranges selected earlier.

c. Choose how you want it to be delivered

As an email with the full report attached, or as an email notification with a link to the report on the bp Fuelcard Online portal.

d. Determine who you want to receive the report

Select a Contact or provide an email address.

Did you know?

To manage your recurring reports on an ongoing basis, or access past recurring reports, view the separate tutorial about 'How To Manage Recurring Reports'.

Report Scheduling

* Report scheduling

Run this report just once

Schedule this as a new Recurring Report

Recurring Report options

Note: Recurring Report frequency overrides any dates you may have selected above.

* Report name *Helps you identify this Recurring Report later*

My monthly report

* Delivery email options

Email full report as

Email notification o
With a link to the report

* Generate a new report every

Calendar month ? *Your report will include data*

Report Delivery

* Report delivery

Download and display

Send to contact email: ?

Send to another email:

Compress email attachment ?



For more information contact bp

bp Fuelcard Virtual Assistant
bp Fuelcard Online
Portal



Email your enquiry to
BPFuelcard@bp.co.nz



Or contact your
Sales Manager

